

Agency Strategic Plan

Jamestown-Yorktown Foundation

Agency Mission, Vision, and Values

Mission Statement:

Jamestown-Yorktown Foundation's mission is to educate and to promote understanding and awareness of Virginia's role in the creation of the United States of America. The Foundation, accredited by the American Association of Museums, is an educational institution of the Commonwealth of Virginia and administers two living-history museums. Jamestown Settlement interprets the cultures of 17th-century colonial Jamestown, America's first permanent English settlement, and the Powhatan Indians. The Yorktown Victory Center interprets the impact of the American Revolution on the people of America and the development of the new nation.

Agency Vision:

We envision the Jamestown-Yorktown Foundation as an institution that:

- provides engaging exhibits and 17th- and 18th-century living history museum experiences for hundreds of thousands of visitors;
- provides highly effective historical educational experiences for children in each of Virginia's school districts and other school districts in the nation and the world that wish to participate;
- provides inviting and historically accurate sites that are fun and facilitate learning;
- displays, interprets and protects key artifacts of the Jamestown and American Revolution eras;
- maintains a cadre of trained, highly competent and effective interpreters, teachers, historians, curators and volunteers that ensure that visitors and students understand key concepts that have led to the creation of the United States of America; and
- serves as a model workplace in terms of fairness, diversity and team spirit.

Agency Values:

- Integrity
- Diversity
- Effective Communications
- Historical Accuracy
- High Quality of Customer Service
- Efficiency in Operations
- Creativity and Innovation
- Professionalism
- Fairness
- Openness
- Consistency of Effort
- Accountability

Agency Executive Progress Report

Current Service Performance

The Jamestown-Yorktown Foundation (JYF) operates two living-history museums: Jamestown Settlement (JS) and the Yorktown Victory Center (YVC). It serves visitors to these museums, and provides structured education programs to students at both museums and outreach instruction to schoolchildren across the

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Commonwealth. As a result, JYF is a major provider of public education services and an important tourism destination. Visitation at the museums totaled 641,642 in FY2005. As part of a comprehensive customer research program visitors complete comment cards during their visit, part-time research staff conduct structured surveys with randomly selected visitors, and teachers participating in structured education programs complete program evaluation forms. In FY2005, 99% of visitors and teachers surveyed rated their experiences with the museums/programs as “good” or “excellent,” exceeding our DPB performance measure goal of 95%.

JYF is heavily dependent upon admissions revenue to support its operating budget, and paid visitation totaled 588,132 during FY2005. Approximately 42% of JYF’s operating budget is non-general fund, primarily generated through admission ticket sales. Research indicates that “word-of-mouth” recommendations are a significant factor in a tourist’s decision to visit JYF museums. Among the top reasons indicated by visitors to attend the museums were an interest in history, their children’s education, or a vacation or business trip. Research shows that JYF is meeting these expectations.

Based on an economic model developed by the University of Virginia, the JYF economic impact to the Williamsburg (Historic Triangle) economy was \$93 million in 2004.

During the 2004-2005 academic year, JYF provided hands-on programs to students at both museums and in outreach settings. Structured educational programs at the two museums served 206,253 participants, up 5% from the previous year. Outreach education programs were presented to 99,878 students in 117 of Virginia’s 132 school districts. Educational programs are designed to address the Commonwealth’s Standards of Learning (SOLs) for history and social studies.

The JYF artifact collection expanded by 288 artifacts to a total of 68,969 during FY2005. The collection consists of furniture, portraits, decorative items and archaeological artifacts. Recent additions include a 17th-century portrait of the Earl of Pembroke for JS and an 18th-century Eastern Shore clothes press for YVC.

Among the impacts on JYF performance were physical changes to the museums and support facilities, including the completion and opening of an expanded parking lot and entranceways at JS, the completion of a 40,000-square-foot permanent exhibition galleries wing at JS, and the completion of a 50,000-square-foot central support complex. The new JS permanent exhibits are currently being fabricated, and replacement exhibits for two galleries at YVC are currently under way. The new JS introductory film is nearing completion. Additional programming was provided at times last year to ensure visitor satisfaction during construction. Additional capital projects were under way or out to bid at year’s end.

The JYF administrative team continues to seek to maximize its service performance and has met its goals overall with respect to the categories contained in Virginia Excels and Virginia Results. However, there are specific areas in which JYF is taking steps to improve performance, specifically in information technology planning, training and development, and internal controls.

Finally, JYF private affiliates raised significant private funds through both charitable donations and retail operations to leverage public dollars to support museum programs and facilities. Pledges to The Campaign for Jamestown Settlement met 50% of the total goal. Profits from three museum gift shops and the JS café also supported JYF operations.

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Productivity

JYF operates two living-history museums and a successful outreach program, and provides support to Jamestown 2007 operations. JYF operates on a business model, examining its return on investment to measure its productivity. For example, in FY2005, the JYF obtained admissions income of \$5 for every \$1 expended on direct media advertising.

During FY2005, JYF initiated the “Barometer Project,” designed to analyze 2007 commemoration staffing plans to ensure museum efficiency and effectiveness at various projected visitation levels, control costs, and ensure the flexibility to increase or decrease staffing levels as visitation patterns change. External reviewers with experience in this area will be asked to examine JYF staffing plans and provide suggestions for improvements, including the adequacy of the proposed management infrastructure to properly supervise activities during the commemoration period.

Acquisition of technology to reduce JYF operating costs has been a challenge. However, beginning this year, HVAC technicians are able to control temperature and humidity levels in our museums over the Internet, which makes it possible to manage several sites at the same time from a single location. Film projection systems in the museums are being updated, as is other audio-visual equipment and lighting to ensure both effectiveness of the equipment and lower operating costs.

JYF has acquired software and is ready to test some limited, low-cost improvements to accounting systems to increase productivity. It includes software developed by the Virginia Bar Association to both upload and download transactions from the Commonwealth Accounting and Reporting System (CARS), and private affiliate accounting software to streamline financial reporting timelines. Productivity will be significantly increased only through the acquisition of an Enterprise Resources Planning (ERP) system, currently being considered by the Virginia Information Technologies Agency under the Public/Private Educational Facilities and Infrastructure program (PPEA).

JYF has nearly 300 part-time employees who work on a seasonal basis depending on projected visitation. Human Resources is actively developing a database of part-time staff that would allow JYF to identify existing employees with specific skills to fill specialized staffing needs. This reduces the need to continually hire additional people to satisfy temporary workload needs and provides agency part-time staff with a more stable source of income, reducing part-time employee turnover. This program was helpful in FY2005 and is contributing to JYF’s goal to reduce turnover and manage recruitment costs.

JYF also makes extensive use of volunteers. A total of 1,000 volunteers provided 37,050 hours of service to all areas of the JYF’s programs and activities in 2004. This is an unusually high figure resulting from a sailing expedition and is expected to return to more normal levels in the coming year.

Among the factors that create employee turnover and resulting productivity losses are high levels of workforce competition in the Historic Triangle, JYF’s high reliance on part-time staff, an inadequate recruitment budget, and limited dollars to adjust staff compensation to reflect the current market. JYF is working to secure funding to address these issues. JYF also provides an extensive training program that constantly incorporates the latest historical research and visitor/student/teacher evaluations to ensure that staff provides the highest quality services possible. If staff are retained and turnover is reduced, this effort is a proven investment in JYF services.

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Major Initiatives and Related Progress

During FY2005, three major building projects were completed: The 50,000-square-foot central support complex, the 40,000-square-foot JS exhibition galleries wing (the fourth and final addition to the gallery complex), and the JS parking lots and entranceways project. The JS maintenance building is under renovation. At FY2005 year's end, the James Fort/Powhatan Indian village storm water and boardwalk project was out to bid, as was the JS sewer pump station. The JS riverfront amenities and shipwright building project will be out to bid by Fall 2005.

During FY2005, JS and YVC exhibit planning was well under way. A \$9.7-million fabrication contract for the new JS permanent galleries was signed before year's end. Proposals to secure fabrication contracts for two YVC galleries will be issued in FY2006, and many artifact loan agreements have been secured for "The World of 1607" special exhibition at JS in 2007. Loaned artifacts are anticipated from the Sorbonne in France, the Ashmolean and the Royal Armouries in Great Britain, the State Museum of the Kremlin and the Historical Museum in Moscow, the Danish National Museum in Denmark, the Patrimonio Nacion in Spain, the Topkapi Palace Museum in Turkey, and other international museums. A new JS introductory film, which is being financed with private funds, is almost complete.

Two of JS's three ships are being replaced before the 2007 commemoration. Construction continues on a new Godspeed, and soon bids will be received for a new Discovery. Both of the new reproduction vessels will be more historically accurate than the current replica ships, based on recent research developments.

JYF also seeks to expand its on-site and outreach structured education programs to serve all school districts in the Commonwealth, as well as use private funds to expand programming to selected sites outside the Commonwealth.

JYF will have to replace its ticketing/reservation system by 2008 when the current vendor will discontinue software support. A consultant, obtained through a VITA contract, reviewed JYF's needs, current software, and business processes last year, and surveyed the software market to identify strengths and weaknesses of at least four potential vendors for a new system. JYF is currently taking steps to issue an RFP during FY2006 in an effort to have the new system operational before the 2007 commemoration.

Virginia Ranking and Trends

JYF museums are accredited by the American Association of Museums (AAM), a widely recognized seal of approval that brings national recognition to a museum for its commitment to excellence, accountability, high professional standards, and continued institutional improvement. Only approximately 5% of museums in the United States meet AAM's rigorous criteria for accreditation. JYF is also the leading provider of structured educational programs in the Commonwealth. JYF outreach education programs are endorsed by the National Council for the Social Studies, the nation's leading association of social studies educators. A DOE study found JYF education programs "to be exemplary of best practices in museum education, and suggests that they serve as a model for others who seek to form links between museums and schools."

Customer Trends and Coverage

With respect to museum visitation, slightly over 75% of individual visitors to the JYF's museums come from out-of-state. States with the highest number of visitors include Pennsylvania, New York, New Jersey, Ohio, Maryland, California, Florida, Illinois and North Carolina. Both museums rank in the top 20 of Virginia tourist destinations.

Museum visitation climbed by 50% during the decade of the 1990s as JYF's marketing team expanded its niche marketing strategy to maximize the rate of return on the investment of limited advertising funds. However, visitation declined following the events of September 11, 2001, the 2002 sniper attacks along Interstate 95, and an economic downturn. JYF's advertising budget was reduced, as was destination advertising for Williamsburg as a whole. The impact was a reduction in visitation to 588,132 in FY2005 compared to 723,392 in FY2001.

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Future Direction, Expectations, and Priorities

During the 2006-2008 biennium, JYF expects to accomplish the following priorities:

- Board of Trustees will enhance governance systems through the strategic long-range planning process.
- Complete the JS building program envisioned in the Comprehensive Facilities Master Plan in time for the 2007 commemoration.
- Open the new JS permanent exhibition galleries, as well as the special exhibition, "The World of 1607," which will be on display for one year during the commemorative period.
- Complete YVC renovations and re-open two galleries in time for the 225th commemoration in October 2006 of the Siege of Yorktown.
- Provide special programming at both museums during the commemoration period in order to manage the anticipated surge of visitation and to meet visitor expectations.
- Replace the current ticketing software and hardware that will no longer be supported by the vendor sometime in 2008.
- Provide an off-site interpretive team to provide pageantry and educational services during the Godspeed commemorative sail and at special commemorative events across the Commonwealth.
- Successfully operate a greatly expanded physical plant.
- Ensure sufficient front-line staff to meet visitor expectations for their museum experience.
- Host special commemorative events.
- Meet or exceed all of the state's financial, human resources, information technology, procurement and other administrative compliance requirements.
- Increase the diversity of our workforce.
- Provide reasonable incentives to retain key temporary front-line staff through the commemorative period.
- Increase on-site structured education program participation by 24,000 students.
- Increase outreach education program student participation by 42,000 students, and conduct the programs in 100% of the Commonwealth's school districts.
- Meet or exceed the requirements for artifact loan agreements so that artifacts from international museums will be made available for display at JS during 2007.
- Acquire key artifacts that the board has identified to enhance the quality of exhibits at both museums.
- Ensure that all exhibits are well maintained and necessary repairs are made in a timely fashion.
- Maintain and refresh JYF's investment in technology infrastructure and capabilities.
- Ensure sufficient public access to JS ships and meet Board of Trustees expectations for JYF's sailing program.

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- Wisely spend marketing funds to maximize the return on investment for every advertising dollar spent.
- Ensure superior safety and security for staff, the public, and our property.
- Raise private funds to assist with programming and exhibit enhancements.
- Maximize the net income from retail operations in order to increase non-general fund support for JYF programs.
- Enhance governance systems to ensure state compliance requirements are met.
- Successfully train, recruit and retain key staff through the commemoration.
- Utilize technology to create effective programs and services and to improve the management of JYF museums.
- Recruit, retain and effectively utilize volunteers to meet agency objectives.

Impediments

Examples of impediments and/or potential impediments JYF faces in satisfying visitor expectations and achieving its mission are as follows:

- Insufficient destination advertising for the Williamsburg area compared to that being successfully purchased by competing travel destinations.
- Reduced cooperative advertising programs in the Williamsburg area.
- Time poverty for visitors that come to Williamsburg (the average visit is 2.5 days instead of 3.7 days visitors spent in 1995).
- Competitive employment market in Historic Triangle that makes recruiting and/or retaining volunteers and additional front-line staff difficult, as JYF faces expected higher-than-normal employee turnover during the commemorative period.
- Unexpected exhibit fabrication or construction project issues, such as unseasonably wet weather, that could delay a fabricator or contractor from project completion by the due date. Also, higher-than-average price increases for construction materials or contractors, given the huge amount of ongoing construction in the Historic Triangle and adjacent metropolitan areas.
- Inability to perform all construction before and/or after hours of visitation and still meet deadlines.
- Significant competition for private donations.
- Inability to control all variables and to predict precisely the visitation levels that will occur during the 2007 commemoration.

Agency Background Information

Statutory Authority

§ 23-287 of the Code of Virginia establishes the Jamestown-Yorktown Foundation as an educational institution to administer certain historical museums and related programs. JYF is charged to further an appreciation of the contributions of the first permanent English-speaking settlers and their American Indian neighbors of Virginia and the United States to the building of our Commonwealth and nation, to commemorate the winning of

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American independence on the battlefield at Yorktown, and to enhance our understanding of the creation of the United States Constitution and Bill of Rights, including Virginia's role in shaping the fundamental principles of the American constitutional system.

In addition, JYF has the authority to establish nonprofit corporations as instrumentalities to assist in administering JYF affairs and to receive and expend gifts, grants and donations from whatever source derived for JYF purposes.

JYF, with the consent of the Governor, may enter into agreements or contracts with private entities for the promotion of tourism through marketing without competitive sealed bidding or competitive negotiation provided a demonstrable cost savings, as reviewed by the Secretary of Education, can be realized by the JYF and such agreements or contracts are based on competitive principles. It may also determine what paintings, statuary, works of art, manuscripts, and artifacts may be acquired by purchase, gift, or loan, and to exchange or sell the same if not inconsistent with the terms of such purchase, gift, loan or other acquisition.

Customer Base:

Customer Description	Served	Potential
General public visitors	640,000	1,000,000
Private and corporate donors	2,057	5,000
Virginia public school divisions	117	132

Anticipated Changes In Agency Customer Base:

An increase in visitation is anticipated during the Jamestown 400th Anniversary Commemoration and the 225th Anniversary of the Siege of Yorktown in the 2006 - 2008 biennium.

As new or reinterpreted facts, artifacts and theories evolve, JYF efforts to accurately reflect the presentation of new information in museum exhibits and by museum services staff must change, as well.

As the Jamestown 400th Anniversary Commemoration and the 225th Anniversary of the Siege of Yorktown approach, potential donors have been vigorously sought after by the JYF and its affiliates. While that pool of potential contributors remains relatively constant, potential donors may be drawn to other programs and JYF could lose crucial support.

While the number of Virginia school districts is relatively stable, the student population continues to escalate with the general demographics of the Commonwealth. This results in unsatisfied demand generated from school districts that do not currently participate in museum programs, the increased number of students in real terms and the constant turnover of grade, middle and high school student populations in districts already served. Through the potential of existing and emerging technology, JYF has the opportunity to extend products and services virtually to an almost limitless world-wide customer base.

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Agency Partners:

Colonial National Park- Historic Jamestowne

Joint destination messaging and promotion, joint special events, cooperative opportunities, joint ticketing, training and historical research to promote visitation and tourism growth.

Colonial Williamsburg Foundation; Busch Gardens; Water Country USA

Joint promotional and advertising efforts to maintain and stimulate visitation, economic tourism growth and non-general revenues.

Jamestown-Yorktown Educational Trust

The Jamestown-Yorktown Educational Trust provides financial support through its gift shop and food service operations.

Jamestown-Yorktown Foundation, Inc.

The Jamestown-Yorktown Foundation, Inc. (JYF, Inc.) coordinates private fund development in support of JYF programs. The JYF, Inc. is administered by a board of directors consisting of no more than 30 members, including at least three but no more than seven members of the JYF's board of trustees, as well as the trustees' chairman.

Virginia Tourism Authority

Augments promotional and advertising efforts to maintain and stimulate visitation, economic tourism growth and non-general revenues for Jamestown 400th Anniversary Commemoration.

Williamsburg Area Convention and Visitors Bureau; Williamsburg Hotel/Motel Association

Joint promotional and advertising efforts to maintain and stimulate visitation, economic tourism growth and non-general revenues.

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Agency Products and Services:

Current Products and Services

Open to the public year-round, JS and YVC museums present the story of the nation's beginnings, from the arrival of the first permanent English colonists in 1607 to the American Revolution and the adoption of the Constitution and Bill of Rights almost two centuries later. Both museums offer gallery exhibits, featuring a distinctive collection of 17th-and 18th-century artifacts, and living history in life-size re-created settings: a Powhatan Indian village, colonial fort, riverfront discovery area and three 17th-century ship replicas at JS, and a Continental Army encampment and 1780s "middling" farm at YVC. JYF on-site and outreach education programs, which correlate with Virginia SOLs, allow students to use reproduction artifacts to explore 17th- and 18th-Virginia history. Structured on-site programs incorporate experiences in the outdoor interpretive areas.

Factors Impacting Agency Products and Services

- Use of non-general funds for replacement of the ticketing system that otherwise would be used for programming.
- Highly competitive labor market in the Historic Triangle.
- Staff turnover issues associated with a high reliance on part-time staff.
- Inadequate overall investment in advertising Williamsburg as a tourism destination compared to what is being spent by competing destinations.
- Changing technology infrastructure and application needs.
- Increasing population of school children to be served with educational programming.
- Special commemoration activities expected by state leaders and the public in 2007.
- Maintaining and operating an expanded physical plant.
- Managing safety and security with the expected surge of visitation and increased after-hour special events.

Anticipated Changes in Agency Products and Services

During the upcoming biennium, JYF will continue investing time, people and other resources in the museums' product and services. For example, JYF is developing the concept and programmatic elements of a virtual "electronic field trip" to reach hundreds or even thousands of students and visitors who might otherwise not have the opportunity to share in the museums' on-site programs. JYF plans to implement a new reservation ticketing system to help manage museum capacity in a visitor-friendly way to make a visit much more enjoyable while optimally utilizing the museum facilities. The 2006 Godspeed Sail will not only bring national attention to this historically significant Jamestown commemoration, but stimulate museum visitation and donations.

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Agency Financial Resources Summary:

JYF funding of the base budget comes from general funds 58% and non-general fund sources including admissions revenue 42%.

	<u>Fiscal Year 2007</u>		<u>Fiscal Year 2008</u>	
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund
Base Budget	\$8,876,696	\$6,305,526	\$8,876,696	\$6,305,526
Changes To Base	\$1,125,599	\$1,043,412	\$726,208	\$1,545,868
AGENCY TOTAL	\$10,002,295	\$7,348,938	\$9,602,904	\$7,851,394

Agency Human Resources Summary:

Human Resources Overview

As of July 1, 2005, JYF has an authorized maximum equivalency level (MEL) of 211. Ten of the 211 positions are of limited duration approved specifically to support the 2007 commemoration. This MEL level includes 37 new positions in FY2006 which are currently being recruited.

JYF operates two educational living history museums (JS in Williamsburg and YVC in Yorktown) and a central support complex in York County. Many employees dealing directly with customers work at both education museums and may commute between locations daily. Employees responsible for facilities and maintenance may commute between all three locations daily.

Thirty-five percent of current on-board employees (168) are full-time, salaried staff (classified and excepted). Salaried positions include interpretive staff, maintenance staff, curatorial and exhibit services, as well as management, supervisory, strategic, or administrative positions.

The JYF staff configuration differs from many state organizations in that the 65% of staff currently employed (311 employees, 90 FTE's) are paid hourly and work no more than 1500 hours per year. For the most part, hourly positions are front-line, working directly with customers by providing education tours, gift shop services, visitor services, outreach instruction and costumed interpretation. Other hourly positions support finance, development, facilities, marketing and the executive administrative offices.

JYF museums are open 363 days per year, closing only on Christmas and New Year's Day, therefore many of the hourly and classified positions must work weekdays and weekends. Additionally, many staff must work outside dealing with all types of weather conditions. Hours worked by part-time, hourly staff are 100% dependent on revenue earned and therefore may fluctuate dramatically. Approximately 35% of salaries for classified and excepted employees are dependent on non-general fund revenue.

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Full-Time Equivalent (FTE) Position Summary

Effective Date:	7/1/2005
Total Authorized Position level	211
Vacant Positions	43
Non-Classified (Filled).....	0
Full-Time Classified (Filled)	168
Part-Time Classified (Filled)	0
Faculty (Filled)	0
Wage	90
Contract Employees	4
Total Human Resource Level	262

Factors Impacting Human Resources

Recruitment and retention of a highly competent workforce leading into and during 2007: Issues to be addressed include how to remain competitive in a tight employment market, and development of strategies to assure that dedicated staff and volunteers are not burned-out during this anticipated high-workload/high-volume visitation period.

Recruitment and retention of a diverse workforce: Issues to be addressed include expanding the diversity of the workforce by developing strategies to draw a diverse candidate pool from cities and counties surrounding Williamsburg and Yorktown. This will be especially challenging when confronted with rising gas prices and limited hours for part-time employees.

Unexpected increases and decreases in visitation and non-general fund revenues: The 2007 commemoration brings many unknowns that impact the level of non-general fund resources that may be required over the next couple of years. Challenges include how best to quickly increase or decrease staff levels based on visitation levels during the commemoration, and how to decrease resource levels with minimal impact if visitation levels decrease dramatically post-commemoration. Specialized training, increased paperwork, office equipment and facilities are related issues that must be addressed.

Anticipated Changes in Human Resources

Human resource levels have been increasing steadily over the past few years especially with the 2007 commemoration on the horizon. A number of human resources issues may arise if projected visitation levels do not materialize leading to 2007, or if workload needs drop dramatically post-commemoration. These issues may include maintaining staff morale, re-training, severance packages, reorganizations, position reclassifications, and employee assistance.

Projected visitation levels may materialize or exceed expectations in 2007 and beyond creating new and increasing permanent workload demands. A different set of human resource issues will arise including resource strategies for meeting workload expectations, justifications, and negotiations for procuring additional staff (increased FTEs), increased recruitment efforts, and human resource program expansions.

Agency Information Technology Summary:

Current State / Issues

JYF primarily relies on off-the-shelf application packages for point-of-sale ticketing, gift shop sales and inventory, fundraising, collections management. These applications must be maintained and upgraded periodically to provide JYF with the effective tools to manage business processes that generate 42% of the its operating revenues. In FY2006, JYF will hire a database administrator to manage these multiple databases, oversee report writing and maintain software upgrades.

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The major issue confronting JYF is the replacement of the ticketing/reservation system. JYF is currently using a terminal-based ticketing software package installed in 1999 to support operations (i.e., reservations, on-site education group scheduling, off-site outreach education scheduling, invoicing, etc.). The software provider has indicated that it will phase out support for its terminal-based software by 2008 which has placed JYF in immediate need for a new software solution as it prepares for the 2007 commemoration.

In FY2005, JYF hired a consultant to review its needs, current software and business processes and identified the strengths and weaknesses of four potential replacement vendors. JYF has identified non-general funds in its base operating budget to proceed with this project in FY2006. The project was approved by the IT Investment Board for the 2004-2006 biennium.

The construction of new JS museum facilities has necessitated reconfiguration of the network infrastructure. In addition, previously grandfathered demarcation sites for telephone service have been demolished, requiring new wiring and planning for telecommunication infrastructure.

Over the past two years, JYF has made significant progress in addressing needed changes to the IT infrastructure. Some aging servers have been replaced and storage capacity upgraded but others servers need to be replaced. Improved connectivity between JYF's three geographic sites has been implemented and bandwidth increased. However, continued high usage between the three sites, and the Jamestown 2007 site, may require additional bandwidth to maintain acceptable connectivity speeds.

Recent applications added to the network include software to monitor and control energy usage in the JYF's facilities and tracking software for work orders. JYF is also implementing the use of accounting software for state expenditures and working on automating batch processing with CARS for upload/download of transaction data.

Factor Impacting Information Technology

The most critical issue is the replacement of the ticketing/reservation system. With the anticipated increase in visitation in 2007, it is crucial that this major system replacement be completed in FY2006.

Changes resulting from VITA transformation activities will impact the support and operations of the network infrastructure. Additional funding received in the FY2006 base budget will assist in offsetting increased costs related to the proposed shared services rate structure. JYF museums operate 363 days a year so it is critical that network support and infrastructure is supported and maintained 24 hours a day, 7 days a week.

JYF would like to have a three-year refreshment cycle for servers and personal computers and to minimize the number of users on different operating platforms. Currently, it needs to upgrade users to Windows XP and Office 2003.

Improving connectivity between sites remains a challenge due to limited services available. Transparent light service is not available from the vendor due to JYF facilities' physical distance from the vendor's central office. Construction funds to expand the service to JYF are limited and currently there are no other customers requesting the service.

Increased technology-driven exhibits in the new JS permanent galleries will require additional increases to the network. Use of closed-circuit television monitoring for security is also placing more strain on the existing bandwidth.

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Anticipated Changes / Desired State

The replacement ticketing software will implement a commercial off-the-shelf technology package to meet the JYF's ticketing, scheduling and resource management needs. The new software solution will replace the existing terminal based system and offer new functionality (timed ticketing, web-based ticketing, kiosks, bar coding, etc.) that will improve operational efficiency and be critical in supporting the increased number of visitors anticipated for the Jamestown 400th anniversary commemoration. Expected benefits include improved system administration, greater focus on customer experience, ability to customized confirmation and invoice content and format and better management of JYF resources.

To integrate operations for JYF and its private affiliates, JYF would like to utilize an integrated financial accounting and management planning system. This system would address issues that arise from utilization of stand-alone state applications such as CARS, CIPPS, eVA and PMIS. In addition, JYF would be able to use such a system to integrate financial activity from its private affiliates to develop comprehensive management reports. It would like to begin planning for implementation of a system after the 2007 commemoration period. The Enterprise Application PPEA currently under evaluation by VITA may impact this project.

Working with VITA, JYF would like to upgrade existing systems to Windows XP and Office 2003. Upgrades to the e-mail system are also required. Upgrades to basic software and hardware maintenance contracts will be used to reduce workload on IT staff. Additional bandwidth will be acquired to maintain necessary speed and data transfer between sites.

Agency Information Technology Investments:

	<u>Cost-Fiscal Year 2007</u>		<u>Cost-Fiscal Year 2008</u>	
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund
Major IT Projects	\$0	\$0	\$0	\$0
Non-Major IT Projects	\$10,609	\$0	\$0	\$52,769
Major IT Procurements	\$0	\$0	\$0	\$0
Non-Major IT Procurements	\$0	\$0	\$0	\$0
Totals	\$10,609	\$0	\$0	\$52,769

Agency Capital Investments Summary:

Current State / Issues

Physical plant: Our three principle locations - Jamestown Settlement, Yorktown Victory Center and Central Support Complex are/or will be relatively new or renovated facilities. In order to protect these assets and extend their economic and practical operating life, our major and routine maintenance requirements have increased and will continue to do so. Maintaining visitor-sensitive areas such as rest rooms in a clean operating condition is vital to visitors' overall positive experience. Employee attitudes and moral is also affected by the conditions in which they work. All levels of professional and staff specialized training is necessary to properly utilize and maintain these assets.

Owned or leased Vehicles and Mobile Equipment: Inadequate to provide the necessary support for agency activities such as outreach trips to served school divisions, necessary maintenance and upkeep of buildings, parking lots or grounds, or conducting agency business generally.

Security and safety equipment: Emergency generators, fire prevention and suppression equipment, security warning and communication systems, and safety warning equipment are generally in need of upgrade to provide rapid response and effective backup system to protect employees, visitor and JYF assets.

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Factors Impacting Capital Investments

As the capital investments of JYF's aggressive Facilities Master Plan are constructed and made operational, they will require increased general operating budgets levels and maintenance reserve in order to maintain quality facilities.

Museums by their nature must continue to draw investment in order to provide up-to date changing and revitalized permanent exhibit galleries to attract new and returning visitors.

Technology is an investment which must be ongoing as existing assets are no longer supported or become inadequate for expanded business applications. A program of annual funding specific to technology is required.

Particularly important to JYF educational goals is an ongoing vehicle replacement program to support current service levels to the Commonwealth's school divisions and additional vehicles are necessary to meet JYF objectives to service all divisions requesting outreach programs. The authority and funding to lease and or purchase the necessary vehicular capacity is needed.

Capital Investment Alignment

JYF capital investment has been the lifeblood of its ability to provide any volume of reasonable projected customers with quality products and services mandated by the Commonwealth's General Assembly. It underscores JYF's mission to educate, promote awareness and understanding of Virginia's role in the creation of the United States, and brings to life through facilities, artifacts and interpretation a meaningful representation of 17th-century Jamestown and 18th-century Yorktown.

Agency Goals

Goal #1:

EDUCATION GOAL: Present and interpret the collections and interpretive scope through educational programs, exhibits, publications and innovative communications.

Goal Summary and Alignment:

Educational programs, exhibits, publications and innovative communications technology facilitate the promotion of an understanding and awareness of Virginia's role in the creation of the United States of America.

Statewide Goals Supported by Goal #1

- Elevate the levels of educational preparedness and attainment of our citizens.
- Protect, conserve and wisely develop our natural, historical and cultural resources.

Goal #2:

COLLECTIONS GOAL: Work with private affiliates to collect and preserve objects and other materials relating to the interpretive scope and mission of JYF.

Goal Summary and Alignment:

JYF collections support the educational mission of interpretation and preservation of the stories of Jamestown and the American Revolution.

Statewide Goals Supported by Goal #2

- Elevate the levels of educational preparedness and attainment of our citizens.
- Protect, conserve and wisely develop our natural, historical and cultural resources.

Agency Strategic Plan

Jamestown-Yorktown Foundation

Goal #3:

ECONOMIC DEVELOPMENT GOAL: Promote tourism development and quality of life in the region and Commonwealth in a manner consistent with preserving the historic nature and integrity of the Jamestown-Yorktown-Williamsburg area and the Commonwealth.

Goal Summary and Alignment:

As a result of its success in fulfilling its mission, JYF has an estimated \$93 million impact on the Historic Triangle - as visitors rent rooms, buy meals and other commodities, and visit other attractions during their visit.

Statewide Goals Supported by Goal #3

- Be a national leader in the preservation and enhancement of our economy.
- Protect, conserve and wisely develop our natural, historical and cultural resources.

Goal #4:

FACILITIES GOAL: Develop and maintain JYF buildings and grounds.

Goal Summary and Alignment:

In order to fulfill its mission, JYF must have attractive, well designed facilities that adequately handle visitation demands and ensure the comfort and safety of staff, visitors and artifacts.

Statewide Goals Supported by Goal #4

- Be recognized as the best-managed state in the nation.

Goal #5:

MANAGEMENT AND GOVERNANCE GOAL: Ensure that all operations and programs are consistent with JYF's mission and comply with Board policies, government regulations, and professional museum standards.

Goal Summary and Alignment:

In order to fulfill its mission with limited resources, JYF must operate under sound business principles and satisfy Commonwealth of Virginia state compliance requirements.

Statewide Goals Supported by Goal #5

- Be recognized as the best-managed state in the nation.

Goal #6:

MARKETING GOAL: Maximize public awareness of and interest in JYF's mission, living-history programs, educational opportunities and other programs and services, leading to increased paid attendance and earned income.

Goal Summary and Alignment:

Non-general funds are essential for the operation of the JYF museums and an effective marketing operation is required to bring people to our sites so that the mission can be implemented.

Statewide Goals Supported by Goal #6

- Be a national leader in the preservation and enhancement of our economy.
- Engage and inform citizens to ensure we serve their interests.

Agency Strategic Plan

Jamestown-Yorktown Foundation

Goal #7:

FUNDING GOAL: Ensure financial stability for operating, capital, maintenance and program expenses in support of JYF's mission and maximize support from the JYF's private affiliates.

Goal Summary and Alignment:

Financial support from a variety of sources are required in order to implement JYF's mission.

Statewide Goals Supported by Goal #7

- Be recognized as the best-managed state in the nation.